

STATE OF GEORGIA
RECORDS RETENTION SCHEDULE APPLICATION

Sheet: 1 of
Schedule #: **98-0059**
Effective Date: 12/20/1998

(Agency use)

Date: 10/23/98
Control No.: N/A

(Archives use)

Date Received: 11/17/98
Agency Code: 0416
Control No.: 981117-01

Applicant: Employees Retirement System

Address: Suite 300, Beta Building.
Two Northside 75
Atlanta, Georgia 30318

Phone: 404 352-6400
FAX: 404 352-6431

Creating Office: Georgia Defined Contribution Plan

Administrator: Jim Larche
Deputy Director

Phone: 404 352-6400
FAX: 404 352-6431

Application Type: New

Class: Individual

Series Title: Defined Contribution Plan Refund Files

Dates of Series: July 1, 1992 - [Ongoing]

Access: Confidential (O.C.G.A. § 50-18-72)

Function Documented: Upon receipt of Application for Refund of Contributions, the Georgia Defined Contribution Plan pays a lump sum amount of the total amount credited to such member's account

Consists of: Member's case file

Media: Paper

Arrangement: Terminal digit order by social security number

Indexed by: Computer indexed by case number and name

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Sheet: 2 of
Schedule #: 98-0059
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**Retention
Requirement:**

State Law or Regulation:
Federal Law or Regulation:
Audit Period:
Administrative Need: Fifty (50) years

Cut Off Event: End of each even Fiscal Year

Total
Retention: Fifty (50) years

The above retention period is consistent with the requirements of the Georgia Records Act (O.C.G.A. 50-18-90 et seq.). We submit this retention schedule to the State Records Committee with the recommendation that it be approved for the named record series.

Authorized by:  4/1/99
Jim Larche, Deputy Director Date

Submitted by:  RMO 3/25/99
Pat Shedd, Records Management Officer Date

The State Records Committee approves this recommended retention period for the named records series by the named creating office.

Signed:  4/5/99
Edward Weldon, Secretary of State Designee Date

STATE OF GEORGIA
STORAGE REFERENCE AND DISPOSITION PLAN
RESOURCE IMPACT PROJECTION

Sheet: 1 of
Authorizing Schedule #:98-0059

(Agency use)	(Archives use)
Date: 10/23/98	Date Received: 11/17/98
Control No.: N/A	Agency Code: Control No.: 0416
Series Title: Defined Contribution Plan Refund Files	
Current Accumulation: One Hundred (100) cubic feet	
Annual Accumulation: Twenty-five (25) to thirty (30) cubic feet	
Reference Activity: Two (2) per month	
Series Inventory: Member's Social Security number in terminal digit order (sample inventory page enclosed)	
Storage Containers: Standard one (1) cubic-foot record center boxes	
Special Storage Conditions: Confidential	

Proposed Disposition Instructions:

Cutoff records of series: Each even Fiscal Year

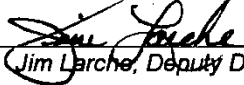
Maintain in the office for: Two (2) years

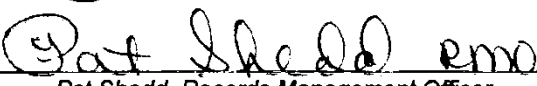
Transfer to: State Records Center

Hold: Forty Eight (48) years

Then: Destroy

The information provided above about the records is true and accurate. The proposed disposition instructions will efficiently protect the rights and interests of the creating agency, the State of Georgia, and the public.

Signed:  4/1/99
Jim Larche, Deputy Director Date

Submitted by:  emo 3/25/99
Pat Shedd, Records Management Officer Date

The Office of Secretary of State, Department of Archives and History agrees to provide storage and reference services for these records in accordance with this Storage and Disposition Plan. Changes in media, rate of accumulation, reference activity or required storage conditions may require renegotiation of the agreement.

Accepted by:  4/5/99
Edward Weldon, Secretary of State Designee Date